



# 2021-2024 STRATEGIC PLAN

## A GUIDE FOR NCRA AND VOLUNTEER LEADERS

### — MISSION STATEMENT —

The National Court Reporters Association promotes excellence among those who capture and convert the spoken word to text and is committed to supporting every member in achieving the highest level of professional expertise.



## BUILDING ON A STRONG FOUNDATION

With an eye to the future, NCRA decided to create a new Strategic Plan to carry the Association — and its members — through the next three years. With the rapid restructuring of the legal arena and many other areas of public life, NCRA sought direct input from members through *JCR Weekly* poll questions and an in-depth survey of members. In addition, six Stakeholder Groups — made up of freelancers, officials, captioners, legal videographers, court reporting and captioning firm owners, and school administrators and court reporting instructors — were invited to engage in frank and open conversations about the future of the profession.

Taken together, this deep exploration of the current state of the industry allowed the NCRA Board of Directors and the Stakeholder Groups to gain the insight to create a guide for the next few years for the Association and the professions it supports. The result is a new Strategic Plan, some of which is detailed here, for the NCRA Board, committees, and staff to use as a blueprint for the next three years.

## OVERVIEW

The goal of the 2021-2024 Strategic Plan is to establish a solid plan of action for the Association that supports members and aids in their professional growth in the fields of court reporting, captioning, and legal videography, as well as those who significantly support these professions, such as school administrators, teachers, and firm owners. Of significant note, this is the first time in more than a decade that the financial solvency of the Association has not been an issue, simply because the Board and staff have reversed the trend of losing significant money each year. The organization is in a budget neutral position, and this allows this Strategic Plan to focus on programmatic issues.

In addition, conversations held by the Stakeholder Groups noted a number of programs that members already rely on or, of the newer ones, have come to appreciate and hope to see expanded. In sum, the groups noted that NCRA has a solid foundation.

Following the discussions, the Stakeholder Groups were asked to use what they learned to develop goals for the Association to best serve the members over the next three years and from those goals pick their top priorities. The Board of Directors then reviewed the priorities to create a cohesive Strategic Plan. The following pages list a number of the goals that the Association will tackle in the next three years. The Stakeholder Groups were also tasked with creating specific tactics for achieving the goals, which will be shared with the committees and staff as the Plan is put in place.



# 2021-2024 STRATEGIC PLAN

The 2021-2024 Strategic Plan sets out the strategic goals and objectives for the National Court Reporters Association. The Strategic Plan is based on polls and surveys of the NCRA membership and, especially, the review and discussion of those results by six Stakeholder Groups representing different aspects of the membership: Freelancer, Official, Captioner, Firm Owner, Certified Legal Video Specialist, and Schools. The groups also reviewed previous strategic plans, previous member needs assessments, information gathered from members in their industry segments over the past two years, and feedback from the NCRA Board of Directors and staff.

Armed with that information, the groups discussed what they would like NCRA to tackle during the next few years. From those goals, the groups were asked to prioritize them and determine tactics to meet those goals. The result is the following group goals, which are to be assigned, as appropriate, to various committees, as well as the NCRA Board of Directors and staff members.

The NCRA Board reviewed all of the goals from the Stakeholder Groups. Having the luxury of seeing everything from the 30,000-foot level, the Board evaluated whether the submitted priorities would fit into the overall work plan of NCRA.

The NCRA Board, its Executive Director, and its staff are grateful to all the volunteers who

donated their valuable time to make this plan come together. Many priorities and tactics did not make this final cut, but that is no reflection of the worthiness of those priorities. It is simply a fact that NCRA does not have the bandwidth to accomplish all the priorities for all the Stakeholder Groups identified. That being said, those ideas have been captured in the “wish lists,” and if NCRA has the ability and time to go back and tackle some of those issues after focusing on the top priorities, it has the next tier of items that will positively affect the individual Stakeholder Groups.

Another important point is that NCRA cannot add new priorities and programs to the current workload if we do not have a mechanism in place to determine what is valuable and what can and should be replaced.

The 2021-2024 Strategic Plan is meant to be a living and dynamic document that serves as a guide for the organization and volunteer leaders. While the long-term mission and vision of the organization remains the same, the Strategic Plan establishes tangible deliverables in the short-term (one to three years). Throughout the short-term, NCRA will continue to “keep its finger on the pulse” of the profession, member needs, and the industry at large to ensure that the Strategic Plan priorities remain relevant.

## FREELANCER

- Increase public outreach to highlight the profession
- Review online testing platform, augment mentorship program, and create solutions for educational institutions wanting to add a stenography curriculum
- Support technology awareness and education

Fr

## OFFICIAL

- Create tools to address the reporter shortage for all segments of the industry
- Create repository of best practices for officials
- Analyze record-keeping methods and create general best practices for decision makers

Of

## CAPTIONER

- Advocate for increased caption quality legislation and standardization for captioning on television and videos
- Revitalize strategic partners program
- Define and promote internally and externally the role of the professional captioner

Ca

## FIRM OWNER

- Promote stenography over digital recording/automated speech recognition
- Create tools to address the reporter shortage for all segments of the industry
- Retool and relaunch NCRA Business Summit

Fi

## CLVS

- Educate attorneys, paralegals, and judges about the importance of using a CLVS
- Revamp and revitalize the Trial Presentation Professional program
- Research hands-on testing regionally and/or at NCRA or state conferences

CL

## SCHOOLS

- Enhance the NCRA A to Z® Intro to Steno Machine Shorthand program by:

*Encouraging schools to tell enrollees they are strongly encouraged to take an NCRA A to Z program or similar before beginning the program*

*Expanding NCRA A to Z programs into high schools to boost awareness of court reporting and captioning and to increase enrollment in court reporting programs*

- Develop specific marketing tools for schools to use for recruitment

Sc

## Areas of responsibility for implementation

Due to the large number of priorities proposed by the Stakeholder Groups, the most efficient way to handle them is to assign them in specific programmatic “buckets” of responsibility that seem to most closely align with the goals above. Further refining of the goals is expected, with possible input from established committees. The priorities will be spread over the next three years in a way to build upon successes, and specific steps and tactics will be shared with the committee members and staff as a guide for them to move forward on this Plan.

### PUBLIC RELATIONS/ MARKETING

- Create tools to address the reporter shortage for all segments of the industry (**Of, Fi**)
- Promote stenography over digital recording/automated speech recognition (**Fi**)
- Define and promote internally and externally the role of the professional captioner (**Ca**)
- Educate attorneys, paralegals, and judges about the importance of using a CLVS (**CL**)
- Increase public outreach to highlight the profession (**Fr**)
- Develop specific marketing tools for schools to use for recruitment (**Sc**)

### ADVOCACY

- Advocate for increased caption quality legislation and standardization for captioning on television and videos (**Ca**)
- Work with state affiliates on the care, custody, and control of the record (regardless of methodology)\*

### EDUCATION/PROFES- SIONAL DEVELOPMENT

- Support technology awareness and education (**Fr**)
- Create repository of best practices for officials (**Of**)
- Analyze record-keeping methods and create general best practices for decision makers (**Of**)
- Revamp and revitalize the Trial Presentation Professional program (**CL**)
- Research hands-on testing [for the CLVS] regionally and/or at NCRA or state conferences (**CL**)
- Retool and relaunch NCRA Business Summit (**Fi**)
- Review online testing platform, augment mentorship program, and create solutions for educational institutions wanting to add a stenography curriculum (**Fr**)

### TARGETED PROGRAMMATIC INITIATIVES

- Enhance the NCRA A to Z<sup>®</sup> program (**Sc**)
- Revitalize strategic partners program (**Ca**)
- Integrate a diversity, equality, and inclusion directive\*\*

\*This strategic goal was added after a survey of all of Stakeholder Group Reports. While this goal was not one that was originally chosen as a priority, similar language came up in all of the reports.

\*\*This strategic goal was added by the Board of Directors.



## WHAT'S NEXT?

While it's great to have goals — and, as mentioned at the very beginning, a plan is only as good as the commitment of the individuals and committees to fulfilling those goals — the next step is to take action. Each of the goals has now been assigned to a programmatic bucket, and these will be the four areas of focus for the next three years:

- 1. Focus on public relations and marketing**
- 2. Education and professional development initiatives**
- 3. Increased advocacy**
- 4. Targeted programmatic initiatives**

In addition to determining the strategic priorities, each Stakeholder Group was asked to evaluate each goal for its importance, timing, and cost and to come up with the tactics that the Board, committees, and staff should consider in turning these goals into reality. As an example, when a goal is given to a committee to accomplish, the information should include a prioritization level, dates for when certain tactics are hoped to be completed, plans for follow-up or reporting progress, and so on. Although the specific strategies and tactics are not shared in this article, the Board has begun sharing the goals and tactics with the appropriate committees, staff, and other individuals.

### “HOW CAN I HELP?”

Stay in the loop! One of the ideas that popped up across several different Stakeholder Groups was the need to provide more materials to support NCRA STRONG; reminding judges, lawyers, and captioning consumers why stenographers are the best choice, as well as how legal videographers support steno reporters in the legal field; and finding ways to recruit more people into the field through greater use of the NCRA A to Z Intro to Steno Machine Shorthand program. As these initiatives come to fruition, they will be shared with members, firms, and schools to use — and you will be helping yourself and everyone else by using them as you deem appropriate.

If you want to get more involved, please volunteer! If you want to be a part of an NCRA committee, all you need to do is let us know. Committees begin their work immediately following the NCRA Conference & Expo. Even though the committees start work following the Conference, you can volunteer at any time, as we may have openings throughout the year. If we don't have an opening, we will keep your name on file for the following year — and as our Strategic Plan covers the next three years, there will be time to be a part of something that matters to you. If you want to participate in one of the committees, contact Laura Butler at [lbutler@ncra.org](mailto:lbutler@ncra.org).

## STAKEHOLDER GROUPS

Thanks to all of the Stakeholder Groups for their participation in the conversations and tackling the prioritization of the goals they came up with. Several of the groups came up with many great ideas, and it is unfortunate that we do not have the ability to tackle them all immediately or even throughout the next three years. The next few pages share a little perspective from each of the Stakeholder Groups, a little more about their goals, and even additional thoughts of what they hope could be accomplished after this Strategic Plan is completed — or, if circumstances change, as resources become available. Some of the ideas were repeated across the Stakeholder Groups, and it's useful to note those trends and commonalities. These additional goals are being presented to highlight how deeply the Stakeholder Groups thought about the future and as insight into the growth of the professions.

## FREELANCER STAKEHOLDER GROUP

The Freelancer Stakeholder Group, which represents the largest number of NCRA members, identified several issues that should be focused on in the next few years: Aiding in public outreach, reducing the entry barriers to the professions, increasing the business acumen and technology awareness of members, centralizing communications, and addressing apathy.

The Freelancer Stakeholder Group believes NCRA can be a robust resource for professional practices and professional development that can help all members, not just freelancers, adapt to changes in business models and delivery of goods and services now and in the future.

The Group narrowed their goals down to three priorities that incorporated most of their concerns:

- Increase public outreach to highlight the profession
- Review online testing platform, augment mentorship program, and create solutions for educational institutions wanting to add a stenography curriculum
- Support technology awareness and education

Looking back on the process, one of the members of the Freelancer Stakeholder Group, Mike Hensley, RDR, of Dublin, Calif., shared that the exploration of the issues facing members took some shifts in perspective: “When you look at things from a leadership level, it's not always easy to understand the issues facing sectors that are

in your blind spot due to lack of awareness or personal experience. It's crucial to hear voices from all types of members so that we can work to identify common needs and to appropriately prioritize what issues should be given the most attention with a thoughtful timeline for action.”

When asked about any surprising outcomes, Hensley shared: “Our team's greatest insight was to bring attention to the need for assessing entry into our profession through taking a critical look into the testing and certification process, as well as encouraging the development of tools and resources to provide greater professional skill building for NCRA members.”

For the future, the Freelancer Stakeholder Group put the following goals on the “wish list”:

- Create centralized resource for distribution of various information and educational materials
- Improve the testing process for certification
- Increase general public awareness to drive support for the profession
- Incentivize professional development
- Strengthen and expand professional community
- Reduce costs by leveraging new resources for event attendance
- Increase recruitment of new talent
- Insulate against marketplace infiltration of deceptive practices and inferior methodologies

## OFFICIAL STAKEHOLDER GROUP

The Official Stakeholder Group found there were several issues that the members of the group thought should be addressed. They felt that it was important to address the reporter shortage, help officials educate their clients on record-keeping methods, address the need for officials to behave professionally and as part of the courthouse team, and recognize the best practices needed to do so. As the members of the group developed their goals, they pointed out that the rules governing state court systems vary across the United States, and this can make developing recommendations for this group particularly challenging.

Ultimately, the Official Stakeholder Group prioritized the following goals for the next three years:

- Create tools to address the reporter shortage for all segments of the industry
- Create a repository of best practices for officials
- Analyze record-keeping methods and create general best practices for decision makers

Allison A. Kimmel, FAPR, RDR, CRR, CRC, an official court reporter from Columbus, Ohio, who was part of the Official Stakeholder Group, explained: “The greatest insight our group provided to assist the Board in planning our path forward is just how similar our areas of concern are to the other professional paths our careers are able to take us. We need to grow interest in our profession, keep schools open, attract students, graduate students, certify those same students, fill positions, keep current on technology, etc. It’s important to include feedback from all segments in order to get a fuller picture of the state of our Association. NCRA is all of us. We are NCRA.”

The items that the Official Stakeholder Group put on its “wish list” were as follows:

- Official/court-specific education on professionalism and being a team player
- Create higher/advanced certifications

## CAPTIONER STAKEHOLDER GROUP

In their discussions, the Captioner Stakeholder Group focused on a few different issues: The continued awareness of professional captioners being the gold standard among caption delivery methods; the importance of certification for those providing captions; and the need to educate people about the importance of caption quality.

The report’s conclusion noted that captioners are passionate about their profession and the quality of the captions our end consumers are provided, and that it is in all NCRA members’ best interests to recognize — and promote to consumers — the professionalism of captioners.

The goals the Captioner Stakeholder Group selected as priorities for the 2021-2024 Strategic Plan are as follows:

- Advocate for increased caption quality legislation and standardization for captioning on television and videos
- Revitalize strategic partners program
- Define and promote internally and externally the role of the professional captioner

“The captioning industry is changing fast!” reminds broadcast and CART captioner Kelly Linkowski, RPR, CRR, CRC, CPE, a member of the Captioner Stakeholder Group. “NCRA must be the go-to for the captioning industry: The professional captioner providing the service, the client hiring for the consumer, and, above all, the consumer themselves.”

“Captioners were in the unique position of not having to learn how to work from home and all the adaptations others had to make during COVID-19. Our biggest challenge during the pandemic has been how to write longer hours to meet our consumers' needs,” Linkowski noted when she responded to a question about the process for the Stakeholder Groups for this article. “The combination of the pandemic and social awareness of the importance of inclusion and diversity opens doors for us captioners and provides something that NCRA can build on.”

Linkowski goes on to note that captioners share much in common with freelance and official reporters: “We are all steno artists with different mediums! Professional stenographers are the best in providing verbatim transcripts in the legal sphere and in sharing communication accessibil-

ity through captioning. We all make each other stronger.”

In the report, the Captioner Stakeholder Group noted that having a full-time, actively writing captioner on the Board or as a consultant to the Board aids the Board in making decisions about the captioning industry.

In addition, the Captioner Stakeholder Group kept the following two items on its “wish list”:

- Be inclusive of captioners. When asked why they are not NCRA members, captioners often say they feel overlooked, and being more welcoming may encourage more captioners to join, thereby increasing membership.
- Shout from the rooftops the captioning activity NCRA engages in to eliminate the “NCRA does nothing for me” attitude.

## CLVS STAKEHOLDER GROUP

The CLVS Stakeholder Group Report noted that the CLVS members are excited to be a part of “a fantastic national organization that has the same interest at heart, protecting the record for the benefit of the general public,” and the CLVS members need and want the full support of the verbatim stenographic and captioning community to succeed and thrive.

As its priorities, the CLVS Stakeholder Group chose the following goals:

- Educate attorneys, paralegals, and judges about the importance of using a CLVS
- Revamp and revitalize the Trial Presentation Professional program
- Research hands-on testing regionally and/or at NCRA or state conferences

“I feel the CLVS Stakeholder Group provided the Board with the insight that CLVS members are 100 percent pro-steno and are excited to support moving the organization forward as a team,” said Andrea Kreutz, CLVS, of Huney-Vaughn Court

Reporters, Ltd., of Des Moines, Iowa, when asked about being part of the strategic planning process. “I think it was important to include feedback from each segment of the NCRA membership to support our diverse backgrounds and work experiences. Each certification has its own talents and goals, and all need to be represented equally for everyone to succeed in maintaining the trust of the general public.”

The CLVS Stakeholder Group put the following items on its “wish list” for the future:

- Training for lobbying efforts
- In-person testing at Conference
- Budget to cover CLVS Council travel costs for Conference
- Legislation and lobbying for certified videographers
- Membership involvement
- Additional budget for program development

# FIRM OWNER STAKEHOLDER GROUP

The Firm Owner Stakeholder Group shared goals that echoed and supported those of the other Stakeholder Groups. As Firm Owner Stakeholder Group member Robin Nodland, FAPR, RDR, CRR, owner of LNS Reporting in Portland, Ore., shared when asked about her participation: “Our membership is diverse, and each segment has a unique perspective. NCRA is smart to engage each group and help us develop the tools necessary to move the ball down the field. There’s so much value in membership in NCRA, so many resources and relationships that help us to collaborate. Working together, we can move mountains.”

The issues the Firm Owner Stakeholder Group thought most pressing are: Increasing member certifications; retooling and relaunching the NCRA Business Summit; creating tools for firm owners that address the reporter shortage; promoting steno over digital methods; and creating firm certification. From those issues, the Stakeholder Group developed the following goals:

- Promote stenography over digital recording/automated speech recognition
- Create tools to address the reporter shortage for all segments of the industry
- Retool and relaunch NCRA Business Summit

“A lot of the tools we need already exist,” Nodland said. “NCRA has great resources for firm owners, but many of us are so busy with our day-to-day tasks that we haven’t taken the time to access the resources in ways that can make a real difference.”

Noting that the power of numbers is what makes NCRA work, which includes the support of firms, Nodland continued: “Members of the Firm Owner Stakeholder Group, working together, were able to come up with tangible plans to put these tools in the hands of firm owners, and also some new tools, and give members the blueprint for how to use them for maximum impact. We also had some “aha” moments, realizing that with a couple of tweaks, good tools can become great tools.”

The items that remain on the Firm Owner Stakeholder Group’s “wish list” are the following:

- Increase member certifications
- Create voluntary firm certification

FREELANCER

Fr

OFFICIAL

Of

CAPTIONER

Ca

## SCHOOLS STAKEHOLDER GROUP

The Schools Stakeholder Group goals focus on items that will increase enrollment, increase graduation rates, shorten total time in school, and make a significant impact in addressing the current problem of the major shortage of court reporters in North America. The participants in the Stakeholder Group noted that the NCRA A to Z Intro to Steno Machine Shorthand program has been helpful in these goals, and their discussions centered on enhancing the NCRA A to Z program.

“I would like to extend a big thank-you to the Board for collaborating with schools to gain insight on the essential needs to continue to improve school enrollments and student graduation rates. Schools across the country are seeing a strong increase in enrollment, largely because of the NCRA A to Z program. One absolute need identified by our group is that NCRA continue to offer and take steps to expand the NCRA A to Z program,” said Jennifer Sati, RMR, CRR, CRC, CRI, a court reporting instructor who was a part of the Schools Stakeholder Group.

The goals the Schools Stakeholder Group came up with were:

- Enhance the NCRA A to Z Intro to Steno Machine Shorthand program by:
  - Encouraging schools to tell enrollees they are strongly encouraged to take an NCRA A to Z program or similar before enrolling
  - Expanding NCRA A to Z programs into high schools to boost awareness of court reporting and captioning and to increase enrollment in court reporting programs
- Develop specific marketing tools for court reporting schools to use for recruitment

“It was a privilege being on the Schools Stakeholder Group and sharing the needs of schools,” Sati said. “As a group, we were excited to exchange stories and ideas, and we recognized that although it’s easy to think of each segment as having separate interests, our successes overlap a great deal – starting with our students.”

Additional goals that ended up on the Schools Stakeholder Group “wish list” were:

- Encourage step certification in schools
- Aid with student motivation
- Encourage schools to teach/add more briefing

FIRM OWNER

Fi

CLVS

CL

SCHOOLS

Sc

# THANK YOU!

NCRA offers its thanks to the NCRA 2020-2021 Board of Directors for tackling this project along with the many, many individuals who participated in the Stakeholder Groups and various conversations and surveys to build this new Strategic Plan.

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